

MEMORANDUM FOR: 

We believe the attached tables will respond to Senator McClure's request during the 18 February hearings.

  
Chief, Energy Issues Branch

Date 23 February 1983

FORM 5-75 101 USE PREVIOUS EDITIONS

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Estimated 1982 Free World Oil Supply and Demand  
(as of 22 February 1983)

(million b/d)

	<u>Production</u>	<u>Available Capacity<sup>1</sup></u>	<u>Consumption</u>	<u>Inventory Change</u>
Total	43.4	50.6	44.5	-1.1
OPEC	19.8	26.5	2.9	
Natural Gas Liquids	1.0	1.0		
OPEC Crude	18.8	25.5		
Algeria	.7	.9		
Ecuador	.2	.2		
Gabon	.2	.2		
Indonesia	1.3	1.6		
Iran	2.3	3.5		
Iraq	1.0	1.0		
Kuwait	.7	1.2		
Libya	1.2	1.8		
Neutral Zone	.3	.6		
Nigeria	1.3	2.2		
Qatar	.3	.6		
Saudi Arabia	6.4	8.5		
United Arab Emirates	1.3	1.3		
Venezuela	1.9	2.4		
Non-OPEC <sup>2</sup>	23.5	24.1	41.6	
United States <sup>3</sup>	10.2	10.2	14.7	
Canada	1.5	1.7	1.5	
Norway	.6	.6	.2	
United Kingdom	2.1	2.1	1.5	
Other OECD	.8	.8	15.0	
Non-OPEC LDC	6.9	7.2	8.7	
of which				
Mexico	3.0	3.1	1.5	
Net Communist Exports	1.5	1.5		

<sup>1</sup> Reflects government production ceilings.

<sup>2</sup> Including natural gas liquids and net communist exports.

<sup>3</sup> Excluding refinery gain.

Non-Communist World: Productive Capacity<sup>1</sup>

(million b/d)

	<u>1985</u>	<u>1990</u>
<u>OPEC</u>	33.5	32.5
Persian Gulf	23.7	23.4
Saudi Arabia	10.7	10.7
Iran	4.0	3.5
Iraq	4.0	4.5
Kuwait	1.6	1.5
UAE	2.2	2.1
Qatar	0.7	0.7
Neutral Zone	0.5	0.4
Other OPEC	9.8	9.1
Algeria	1.1	0.9
Libya	2.2	2.4
Nigeria	2.0	1.9
Venezuela	2.4	2.2
Ecuador	0.2	0.2
Indonesia	1.7	1.4
Gabon	0.2	0.1
<u>Non-OPEC</u>	23.5	23.5
United States	9.8	9.5
Mexico	4.0	4.5
North Sea	3.2	3.2
Egypt	0.7	0.8
Other	5.8	5.5
<u>Total</u>	57.0	56.0

<sup>1</sup> Including natural gas liquids. Estimates are based on the midpoint of the consensus range of forecasts for maximum sustainable capacity. Capacity estimates for Kuwait and the UAE are based on the assumption that these two countries will continue to be reluctant to produce at MSC even during a crisis, although they will be willing to boost output above the self-imposed ceilings which would prevail in the absence of a disruption.

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ARK. HATHFIELD, OREG.  
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BILL BRADLEY, N.J.

## United States Senate

COMMITTEE ON  
ENERGY AND NATURAL RESOURCES  
WASHINGTON, D.C. 20510

Dup?

MICHAEL D. HATHAWAY, STAFF DIRECTOR  
CHARLES A. TRABANT, CHIEF COUNSEL  
D. MICHAEL HARVEY, CHIEF COUNSEL FOR THE MINORITY

February 7, 1983

The Honorable William J. Casey  
Director  
The Central Intelligence Agency  
Washington, D.C. 20505

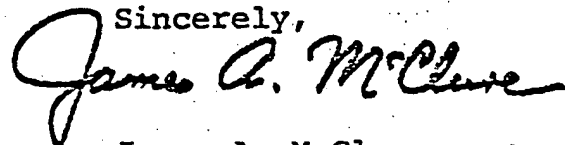
Dear Mr. Casey:

On February 18 and 21 the Committee on Energy and Natural Resources will hold a hearing on the "World Petroleum Outlook." The purpose of this hearing is to review the various factors affecting the international petroleum situation, and to explore the domestic and international implications of possible changes in the market.

On behalf of the Committee, I would like to invite you or your designated representative to appear at the February 18 hearing to provide the Agency's views on these matters.

The hearing will begin at 9:00 a.m. in room S-407 of the Capitol building and attendance will be restricted to those with a top secret clearance. Please provide the Committee with 20 copies of your testimony no later than February 16. You may coordinate your appearance with Mr. Howard Useem (224-5205) of the Committee staff.

Sincerely,



James A. McClure  
Chairman

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## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Congressional Hearing

FROM:

DDI/Congressional Support  
2F42 HQS

EXTENSION

NO.

DATE

8 February 1983

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OGI feels the Agency would more appropriately be represented at this hearing by Mr. Rowen or his designate on the NIC with back-up from OGI.

As you can see from my memo to OGI, we do not have much substantive information to work with, and the CIA principals probably will have to talk directly with Useem and the representatives from State, Treasury and Energy to discern who covers what topic.

Could you float this with the NIC hierarchy?

## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Senate Energy Committee Briefing

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This is the non-CIA line-up for the February 18th Senate Energy Committee hearing:

Department of Energy  
George Bradley, Dep. Asst.  
Secy for Int'l Affairs  
with John Broadman and  
Dennis O'Brien

State  
Allen Wendt, Dept. Asst.  
Secy for Int'l Economic  
Policy  
with James Placke

Treasury  
Mark Leland, Asst. Secy  
for International Affairs